



The Market for Facilities Management in the Nordic Countries

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The Market for Facilities Management in the Nordic Countries



Report 7.2011

DTU Management Engineering

Per Anker Jensen
April 2011

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1. Introduction

The purpose of this report is to present the results of a study of the market for Facilities Management (FM) in four Nordic countries in Europe – Denmark, Norway, Finland and Sweden. The study was carried out with workshops in each of the four countries with focus on the national FM market and participation of FM professionals from the country in question.

The project was part of EuroFM's 'FM Market Data' project, which started in 2010, and I have accepted to act as coordinator for the Nordic countries. As a preparation of this project and CFM's parallel project on FM Futures, a report about the FM sector and its status in the Nordic countries had been produced (Jensen & Dannemand Andersen, 2010). The workshops in Denmark, Norway and Sweden were arranged in connection with workshops on the FM Futures project with the same participants.

The basis for the workshop on the FM market was the new definitions for standardized facility products in a proposed European standard for FM Taxonomy (CEN/TC348, 2009). These definitions have first been used in CFM's earlier study concerning the Danish FM market 2008 carried out in collaboration with Rambøll Management and reported in Jensen (2009).

The aim of the new study was – besides producing data to the EuroFM project - to give an updated evaluation of size, structure and trends of the FM market in Denmark and to collect similar data concerning the other Nordic countries to get a better overview and to be able to make comparisons and obtain deeper insights in the development of FM in the Nordic countries, including similarities and differences between the countries.

Besides the collaboration with EuroFM, the project was carried out in collaboration with NordicFM and national partners. The workshop in Denmark took place in October 2010 and was arranged by CFM in collaboration with DFM. The workshop in Norway and Finland took place in November 2010 – in Norway arranged together with NHO Service and Olav Egil Sæbøe, secretary of NordicFM and in Finland together with Rakli and Suvi Nenonen, Aalto University. In Sweden the workshop took place in March 2011 and was arranged together with IFMA Sweden.

I would like to thank all collaboration partners and the participants in the workshops for their contributions.

Per Anker Jensen
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March 2011

2. Former Studies of the Nordic FM Market

2.1 CapGemini's study of the Nordic FM Market

Capgemini in Norway made a survey of the Nordic FM market by means of 36 interviews in 2004 spread on 29 large companies and 7 FM suppliers. In the evaluations of the size of the market the area of all buildings except from housing in each country was taken into consideration. The total potential FM market was estimated to amount NOK 385 billion equal to €53 billion (Capgemini, 2005).

In table 2.1 the main figures from Capgemini's evaluations are shown as to each country.

Table 2.1: Capgemini's estimation of the total FM market in the Nordic countries in 2004

Country	Building area (excl housing)	Potential FM market (excl housing)
Denmark	125 million m ²	€8,3 billion
Norway	115 million m ²	€8,9 billion
Sweden	235 million m ²	€23,4 billion
Finland	175 million m ²	€11,7 billion
Iceland	10 million m ²	€0,7 billion
Total	385 million m²	€52,9 billion

Capgemini estimated that 75 % of the potential FM market was internally handled, whereas the real market only amounted 25 % of the potential market. These estimations are average numbers for all the Nordic countries. Table 2.2 shows the calculated figures of the actual market compared with the potential or total market.

Table 2.2: Capgemini's estimation of the total and actual FM market in the Nordic countries in 2004

Billion Euro	FM market volume in 2004					
	Denmark	Norway	Finland	Sweden	Iceland	Sum
Total	8,3	8,9	11,7	23,4	0,7	52,9
Actual (calculated)	2,1	2,2	2,9	5,8	0,2	13,2
Degree of outsourcing	25%	25%	25%	25%	25%	25%

Capgemini divided FM into Property Management, Building Operation & Maintenance and Support Services, and the total FM market was estimated to be shared into respectively 11 %, 32 % and 57 % within the field of these services.

In the evaluation the market for integrated FM (I-FM, i.e. the total FM delivery – also named Total FM, TFM) was estimated to amount 6 %, while other kind of outsourcing represented 19 % of the potential market. The market for I-FM had been strongly consolidated within a few companies, of which the biggest was ISS with 44 %, Coor Service Management with 28 %, and Johnson Controls with 10 %.

Furthermore, the evaluation included assessments of the maturity of the market in each country. Elements such as size of the country, degree of industrialisation, presence of multinational companies, the attention of the market in relation to FM, and suppliers with new strategies and innovation, were used as indicators of the maturity of the market. Capgemini reached a ranking order in which the Swedish market were the most mature, followed by Finland, while the Danish market was situated in the middle followed by the Norwegian market, and the Icelandic market was the least mature.

The market as to outsourcing was according to Capgemini's evaluation expected to continue to grow with 8 % annually, but the market for I-FM is expected to grow somewhat more than 14 %. The public sector represented approx. 14 % of the customer base, but the public sector was expected to grow faster than the private market. Table 2.3 shows for the comparison in section 2.4 Capgemini's estimations calculated to 2008 level based on the annual growth rate of 8% from 2004 to 2008 and with the total market unchanged. The result is an increase in the degree of outsourcing from 25% to 34%.

Table 2.3: Capgemini's estimation of the total and actual FM market in the Nordic countries in 2008

Billion Euro	FM market volume in 2008					Sum
	Denmark	Norway	Finland	Sweden	Iceland	
Total (som i 2004)	8,3	8,9	11,7	23,4	0,7	52,9
Actual (calculated, 8%/year)	2,8	3,0	4,0	7,9	0,2	18,0
Degree of outsourcing	34%	34%	34%	34%	34%	34%

As to other trends the evaluation suggests:

- FM organisations are expected to continuously provide better services, but the buyers will continue to lower the FM budget – hence the title of Capgemini's evaluation report: "More for less"

- Corporate managements have increasing attention to FM, and more and more companies are centralizing their FM function
- FM providers will more and more aim at becoming I-FM supplier, leading to increased consolidation and more partnerships

2.2 Sven Teichman's study of the European FM Market

The economic size of FM in relation GDP is according to a recent German PhD study 4,92% for the potential and 2,48% for the actually outsourced market in the five largest European countries: UK, Germany, France, Italy and Spain. The study uses a model of market types as shown in table 2.4. The pioneer markets are UK and Holland, the developed markets are mainly Central European countries but also Denmark, Italy and Spain, emerging markets includes the other Nordic countries, Poland, Czech Republic and Hungary, and pre-emerging countries are mostly South-East European countries and other East European countries.

Table 2.4: Degree of outsourcing and growth rates for FM market types in Europe (Teichmann, 2009)

Market type	Degree of outsourcing	Growth rate
Pioneer markets	56,3 %	6,0 %
Developed markets	43,6 %	8,0 %
Emerging markets	32,5 %	12,3 %
Pre-emerging markets	17,5 %	21,5%

The results from the German market study for the five Nordic countries in 2008 are shown in table 2.5.

Table 2.5: The Nordic FM market according to Teichmann (2009)

Billion Euro	FM market volume in 2008					Sum
	Denmark	Norway	Finland	Sweden	Iceland	
GDP in 2005	218,5	249,5	163,1	302,0	13,4	946,5
Total	10,8	12,3	8,0	14,9	0,7	46,6
Actual	5,1	4,5	2,9	5,4	0,2	18,1
Degree of outsourcing	47%	36%	37%	36%	36%	39%

This is based on an evaluation of the Danish market as a developed market, while the FM market in all the other Nordic countries are evaluated as emerging markets. The degree of outsourcing is near enough the same with 36-37% except for Denmark with 47%.

2.3 CFM's study of the Danish FM Market

At CFM we have earlier researched the FM market in Denmark. We see it as a necessary basis for our research that we get a better documented overview of the FM area in general, and the project about the FM market was a central element in creating such an overview. The project was carried out in collaboration with the consulting company Rambøll Management who was responsible for the data collection by a large number of telephone interviews and data analyses, including estimation of the size of the total Danish FM market.

One of the big challenges of such a survey is that there is no clear delimitation of the FM market. Therefore, an important step in the project has been to make such a delimitation. As a starting point we used the FM definition in the European standard from 2006, which since 2008 has been available in an official Danish translation. According to this definition FM is: *"The integration of processes within an organization to maintain and develop the services which support and improve the effectiveness of its primary activities"* (DS/EN, 2006).

This definition does not, however, bring us any closer to delimitation, but the standard also has a section on the scope of FM. According to that, FM can be grouped around client demands summarised under two main headings: Space & Infrastructure (S&I) and People & Organisation (P&O). This is more or less in line with the commonly used distinction between "hard FM" and "soft FM".

Following this first standard a new European standard for a FM taxonomy has been prepared and is expected to be adopted in 2011. The taxonomy is a classification of the products of FM in a hierarchical structure with associated definitions of the classified products. The taxonomy standard introduces the term standardised facility products, which are generic facility services that can be compared across organisations and borders.

In table 2.6 the left columns state the name of the products in the proposal for the new standard and the corresponding Danish terms used in CFM's survey are shown in the right column. An appropriate Danish translation of 'Hospitality' has not been found, and this has been divided into the two sub-products: Catering and Reception, contact centre and meeting rooms.

CFM's survey of the Danish FM market was the first market research using this new product structure for FM.

Table 2.6: Standardised products in the proposed standard and related Danish terms (CEN/TC 348, 2010)

FM products from proposal to new European standard	Danish names used in CFM's market survey
Space & Infrastructure (S&I)	Ejendomsdrift
• Space	• Bygninger og lokaler
• Outdoors	• Terræn
• Cleaning	• Renhold
• Workplace	• Arbejdsplads
• Industry sector specific	• Branchespecifik
People & Organisation (P&O)	Services
• Health, safety and security	• Sundhed, sikkerhed og sikring
• Hospitality	• Catering
	• Reception, kontaktcenter og mødelokaler
• ICT	• IKT
• Logistics	• Logistik
• Business support (Management support)	• Virksomhedssupport (ledelsessupport)

The market research was based on two surveys divided into providers and clients within FM. The provider survey included 103 enterprises. The data collection with telephone interviews was done in June 2008 before the financial crisis started. The enterprises were selected through a combination of suggestions from an advisory group, providers among DFM's members and among enterprises with more than 50 employees from commercial market database.

The client survey included 272 enterprises and the data collection with telephone interviews was done during November 2008 after the financial crisis had started. The enterprises were almost equally distributed on the four main groups with 76 private service enterprises, 74 public service enterprises, 88 industrial enterprises and 56 housing associations. The enterprises were randomly sampled from a total population of 5,520 enterprises, and the 272 enterprises constitute 5 % of the total population.

According to the survey the total Danish FM market in 2008 is €7.9 billion for the potential market. The survey also shows that the actual Danish market for FM in 2008 was at €4.9 billion. This implies an outsourcing degree of 62 %.

2.4 Comparison of the results from former studies

Table 2.7 shows a comparison of the estimations from Capgemini in table 2.3 calculated to level 2008 with Sven Teichmanns estimations in table 2.5 for FM Market in the Nordic countries in 2008.

Table 2.7: Comparison of estimations of the size of the FM market in 2008

Billion Euro	FM market volume in 2008					Sum
	Denmark	Norway	Finland	Sweden	Iceland	
Total						
Capgemini	8,3	8,9	11,7	23,4	0,7	52,9
Teichmann	10,8	12,3	8,0	14,9	0,7	46,6
Difference	-2,5	-3,4	3,7	8,5	0,0	6,4
Actual						
Capgemini	2,8	3,0	4,0	7,9	0,2	18,0
Teichmann	5,1	4,5	2,9	5,4	0,2	18,1
Difference	-2,3	-1,4	1,0	2,5	0,0	-0,1
Degree of outsourcing						
Capgemini	34%	34%	34%	34%	34%	34%
Teichmann	47%	36%	37%	36%	36%	39%
Difference	-13%	-2%	-3%	-2%	-2%	-5%

The estimations of the size of the aggregated market for all five countries are surprisingly similar around €50 billion for the total and both with €18 billion for the actual market. However, except for Iceland the estimations vary considerably for the individual countries. The Swedish market is largest in both estimations, but Capgemini evaluates the total market 57% higher than Teichmann and the actual market 46% higher. Capgemini also evaluates the Finnish market higher than Teichmann, but the opposite is the case for the Danish and Norwegian market.

The degree of outsourcing is fairly similar except for Denmark, where Teichmann estimations result in 47%. This is based on Teichmann's evaluation of the Danish FM market being the most mature among the Nordic countries, while Capgemini evaluated the Swedish market as the most mature followed by the Finnish market.

CFM's study of Danish FM market in 2008 gave the result that the total market was €7.9 billion and the actual market was at €4.9 billion equivalent to an outsourcing degree of 62%. CFM's result of €7.9 billion for the total market is close to Capgemini's evaluation of €8.3 billion but quite a bit lower Teichmann's evaluation of €10.8 billion. The opposite is the case for the actual market, where CFM's result of €4.9 billion is close to Teichmann's evaluation of €5.1 billion but quite a bit higher than Capgemini's evaluation of €2.8 billion. CFM's result of 65% degree of outsourcing is considerably higher than Teichmann's evaluation of 47% and indicates in relation to Teichmann's market model that the Danish is a pioneer market rather than a developed market.

3. CFM's Workshop Based Study of the Nordic FM Market

3.1 Methodology

The methodology of the study was a workshop based Delphi technique using the participant's qualified guestimates as a basis for discussions and with possibilities to revise the individual evaluations after group discussions. During the workshops the participants filled in a questionnaire, which provided the documentation of the meeting.

In relation to participants the aim was to have a broad presentation of FM professionals from both public and private clients, in-house and external providers, trade organizations, researchers and teachers. The goal was to have approx. 10 participants in each workshop besides the facilitator.

In Denmark CFM invited participants from the board of Danish Facilities Management Association (DFM), DFM's education committee and the former reference group for CFM project on the Danish FM market as well as a few other key persons. In Norway participants were invited by Lasse K. Tenden, NHO-Service and Olav Egil Sæbøe, secretary for NordicFM. In Finland participants were invited by Rakli and Aalto University and in Sweden participants were invited by IFMA Sweden. The study did not include a workshop in Iceland.

The workshops were facilitated by Per Anker Jensen, CFM. All workshops except for the Finnish were arranged together with a workshop as part of CFM's project on FM Futures and the two facilitators for that workshop were also present in the workshops on the FM market in Denmark, Norway and Sweden.

Table 3.1 shows the dates of the four workshops and the number of participants, returned questionnaires and response rates. The intentions were to arrange all four workshops in the last part of 2010 to get input to the first EuroFM Market Data report. This turned out to be impossible for Sweden. The number of participants varied from 7 to 13 with an average of 10, which was satisfactory.

Table 3.1: Workshops and participation

	Denmark	Norge	Finland	Sverige	Sum/average
Date	27-10-2010	05-11-2010	10-11-2010	15-03-2011	
Participants	11	9	7	13	40/10
Questionnaires	11	9	5	10	35/9
Response rate	100%	100%	71%	77%	88%

The hope was to have national market data available, but that was only the case in Denmark and to a limited degree in Norway. This made the workshops in Sweden and Finland more difficult and is seen as a reason for the lower response rate in these countries (77 and 71%).

The workshops were structured with a first part where the focus was on the potential or total FM Market and a second part where the focus was on the actual or outsourced market. It is the impressions that some participants had problems to keep this distinction in mind.

The following presents the collective results for each of the four Nordic countries as well as the aggregated figures and cross analyses of the results.

3.2 The potential or total market

Factors that have influenced the amount of total FM activities

The workshop participants provided the evaluations for the two periods 2004-2008 and 2008-2010 (before and after the financial crisis started) shown in table 3.2.

Table 3.2: Factors that have influenced the amount of total FM activities

Country	2004-2008	2008-2010
Denmark	<ul style="list-style-type: none"> • Economic growth • Knowledge and service society • Focus on environment/sustainability/climate • Integration of functions with synergies • Professionalism • New FM areas, e.g. HR, services and growth markets 	<ul style="list-style-type: none"> • Focus on cost reductions and rationalizations • More strategic focus on FM • Knowledge society • More outsourcing and offshoring • Professionalism • Environment, energy
Norway	<ul style="list-style-type: none"> • Economic growth • Restructuring of core business – more non-core • Internationalisation - labour immigration • Development of service sector • Higher quality requirements • Professionalism • Business continuity (after 9/11) 	<ul style="list-style-type: none"> • Focus on cost reductions • Lack of local labour force • Cuts in public sector • More providers • Maturing market • Environment, sustainability
Finland	<ul style="list-style-type: none"> • Outsourcing • Euro and internalization • New providers and new services • Public savings 	<ul style="list-style-type: none"> • Financial turmoil and increased competition • Cost control • Globalisation

	<ul style="list-style-type: none"> • Business restructuring 	<ul style="list-style-type: none"> • Environment and green buildings • Business change and risk management
Sweden	<ul style="list-style-type: none"> • Save money by outsourcing • Political intentions and decisions • Public procurement regulations • Economic growth 	<ul style="list-style-type: none"> • Maturing market • Higher competences • Cost focus • Politics

During the period from 2004-8 the total FM market was influenced by economic growth and development of knowledge and service society with new providers and services, and the period from 2008-10 it was influenced by the financial crisis with increased competition and focus on cost reductions but also with maturing markets in all countries.

In both periods the total FM market was influenced by increased globalization, professionalism and focus on sustainability. Political decisions and public procurement regulations were particularly mentioned in Sweden, while labour immigration and lack of local labour force was particularly mentioned in Norway.

Changes in potential market

The participants evaluated in average the growth rates from 2008-9 and 2009-10 shown in Table 3.3.

Table 3.3: Changes in potential market

Period	Denmark	Norway	Finland	Sweden	Average
2008-2009	0.2%	0.6%	-	8.0%	2.9%
2009-2010	0.3%	1.5%	-	10.0%	3.9%

The evaluations of high growth rates in Sweden of 8-10% is remarkable compared with the low growth rates in Denmark and Norway

Ranking of main markets

The participants evaluated in average the ranking of the four main markets according to size (turnover) with number 1 largest and 4 lowest as shown in table 3.4.

Table 3.4: Ranking of main markets

Period	Denmark	Norway	Finland	Sweden	Average
Industry	3	3	3	3	3.00
Privat service	2	2	2	1	1.75
Public service	1	1	1	2	1.25
Housing associations	4	4	4	4	4.00

The public service market is evaluated as the largest in all countries except for Sweden, where the private service sector was evaluated as the highest.

Distribution on main activities

The participants evaluated in average relative size of activities related to Space & Infrastructure (S&I) and People & Organisation (P&O) as shown in Table 3.5:

Table 3.5: Distribution on main activities

Period	Denmark	Norway	Finland	Sweden	Average
S&I	62%	60%	40%	36%	49.5%
P&O	38%	40%	60%	64%	50.5%

There is a clear difference between on the one side Denmark and Norway with S&I being the largest and on the other side Finland and Sweden with P&O being the largest part of the total FM market.

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size (turnover) with number 1 largest and 5 lowest as shown in table 3.6.

Table 3.6: Ranking of activities for Space & Infrastructure

Period	Denmark	Norway	Finland	Sweden	Average
Space	1	1	1	4	1.75
Outdoors	4	4	4	5	4.25
Cleaning	2	2	2	3	2.25
Workplace	3	3	3	1	2.50
Primary activity specific	5	5	5	2	4.25

Space was the highest ranking activity and Primary activity specific the lowest ranking activity in all countries except for Sweden, where Workplace was ranked highest followed by Primary activity specific and Space was only ranked as number four.

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size (turnover) with number 1 largest and 6/7 lowest as shown in table 3.7.

Table 3.7: Ranking of activities for People & Organisation

Period	Denmark	Norway	Finland	Sweden	Average
Health, safety and security	2	5	2	3	3.00
Hospitality	(1.5)	(2.5)	5	2	2.75
• Catering	1	2			
• Reception etc.	2	3			
ICT	2	1	1	1	1.25
Logistics	5	4	3	4	4.00
Business support	6	6	4	5	5.75
Organisaiton specific	7	7	5	6	6.25

ICT was the highest ranking activity in all countries except for Denmark, where Catering was ranked highest. Hospitality was only ranked as number five in Finland and Health, safety and security was only ranked as number five in Norway – both much lower than in the other countries.

3.3 The actual or outsourced market

Factors that have influenced the amount of actual FM activities (outsourced)

The workshop participants provided the evaluations for the long term and the short term shown in table 3.8.

Table 3.8: Factors that have influenced the amount of actual FM activities (outsourced)

Country	2004-2008	2008-2010
Denmark	<ul style="list-style-type: none"> • Strategic corporate considerations • Politics • Focus on core business • Provider efficiency • Professionalisation • More providers • Technology 	<ul style="list-style-type: none"> • Economy • Competition • Politics • Competences (or lack of)
Norway	<ul style="list-style-type: none"> • National economic situation • Politics • Labour force • Size of companies • Professionalisation • Competition 	<ul style="list-style-type: none"> • Cost focus • Politics – municipal election 2011 • Availability of labour force • Competences (or lack of) • Professionalism on both sides
Finland	<ul style="list-style-type: none"> • Global connectivity and global markets • Market changes and more developed services • Professionalism and well educated personnel • Outsourcing risks 	<ul style="list-style-type: none"> • Cost effectiveness • Organisational changes
Sweden	<ul style="list-style-type: none"> • Political intentions and regulations • Maturing clients • Globalisation • Increasing market • FM more known 	<ul style="list-style-type: none"> • Economical situation • Added value

For both the long and the short term the economical situation and politics are important factors influencing the degree of outsourcing. The most important long term factors are increased globalisation, professionalism and market maturity. The most important short term factors are competition and availability of labour force and competences. For Sweden added value is also mentioned as a short term factor.

Changes in actual market

The participants evaluated in average the growth rates from 2008-9 and 2009-10 shown in Table 3.9.

Table 3.9: Changes in actual market

Period	Denmark	Norway	Finland	Sweden	Average
2008-2009	-0.7%	0.4%	0.0%	7.5%	1.8%
2009-2010	4.9%	1.6%	5.0%	7.5%	4.8%

As for the total market the high growth rates for Sweden is remarkable also for the actual market with 7.5% both years. For the other countries very low growth rates were evaluated from 2008 to 2009 with even a slightly negative growth rate in Denmark, but this changed with higher positive growth rates in Denmark, Norway and Sweden from 2009 to 2010.

Ranking of main markets

The participants evaluated in average the ranking of the four main markets according to size (turnover) with number 1 largest and 4 lowest as shown in table 3.10.

Table 3.10: Ranking of main markets

Period	Denmark	Norway	Finland	Sweden	Average
Industry	3	2	3	3	2.75
Privat service	1	1	1	1	1.00

Public service	2	3	2	2	2.25
Housing associations	4	4	4	4	4.00

Unlike the total market, Private service represents the largest actual market for all countries. Public service represents the second largest actual market in all countries except Norway, where Industry is second largest.

Distribution on main activities

The participants evaluated in average relative size of activities related to Space & Infrastructure (S&I) and People & Organisation (P&O) as shown in Table 3.11:

Table 3.11: Distribution on main activities

Period	Denmark	Norway	Finland	Sweden	Average
S&I	53%	64%	40%	36%	48,3%
P&O	47%	36%	60%	64%	51,7%

Like for the total market, there is a clear difference between on the one side Denmark and Norway with S&I being the largest and on the other side Finland and Sweden with P&O being the largest part of the actual FM market.

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size (turnover) with number 1 largest and 5 lowest as shown in table 3.12.

Table 3.12: Ranking of activities for Space & Infrastructure

Period	Denmark	Norway	Finland	Sweden	Average
Space	1	1	1	3	1.50
Outdoors	4	3	3	5	3.75

Cleaning	2	2	2	2	2.00
Workplace	3	4	4	1	3.00
Primary activity specific	5	5	5	4	4.75

Like for the total market, Space was the highest ranking activity and Primary activity specific was the lowest ranking activity in all countries except for Sweden, where Workplace was ranked highest.

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size (turnover) with number 1 largest and 6/7 lowest as shown in table 3.13.

Table 3.13: Ranking of activities for People & Organisation

Period	Denmark	Norway	Finland	Sweden	Average
Health, safety and security	3	4	4	3	3.50
Hospitality • Catering • Reception etc.	(1,5) 1 2	(1,5) 1 2	1	1	1.25
ICT	4	3	2	1	2.50
Logistics	5	5	3	4	4.25
Business support	6	6	6	5	5.75
Organisation specific	7	7	5	6	6.25

Hospitality/Catering was the highest ranking activity in all countries of the actual market except for Sweden, where ICT was ranked highest just like it was for the total market.

3.4 The FM market size

As main results of the workshops, the size of the FM market in each country has been estimated.

For Denmark this is based on CFM's market study for 2008 (Jensen, 2009) and calculated for 2009 and 2010 based on the participants evaluation of the average growth rates for the potential and actual market and the relative distribution of activities on Space & Infrastructure and People & Organisation and shown in table 3.14 and 3.15.

For Norway it should be noted that the evaluation for the market in 2009 in table 3.14 is only based on estimates from 5 participants and the lowest and highest estimation are shown in brackets to indicate the uncertainty. The figures for Space & Infrastructure and People & Organisation have been calculated from the participant's evaluations of the relative distribution. The figures for 2010 in table 3.15 are based on the evaluation for 2009 and the evaluation of the average growth rates for the potential and actual market.

The figures for 2009 in table 3.14 only cover Denmark and Norway. These figures were reported to EuroFM's Market Data project in December 2010 and are included in the first report from the project from February 2011 (EuroFM, 2011).

Table 3.14: The size of the FM market in Denmark and Norway 2009

Billion Euro	Denmark	Norway
Total/potential market	7,9	9,2 (8,0-10,0)
• S&I	4,9	5,5
• P&O	3,0	3,7
Actual/outsourced market	4,9	2,2 (0,8-3,5)
• S&I	2,6	1,4
• P&O	2,3	0,8
Degree of outsourcing	61%	24%
• S&I	52%	26%
• P&O	76%	22%

For Finland the workshop did not result in any new evaluation of the size of the FM market. The figures for the Finnish FM market in 2010 shown in table 3.15 are based on averages of the former studies mentioned in chapter 2 with a 5% increase for the actual market from 2008 to 2010. The figures for Space & Infrastructure and People & Organisation have been calculated from the participants' evaluations of the relative distribution.

For Sweden the size of the FM market in 2010 shown in table 3.15 is based on the evaluation by the participants (7 answers for total market and 5 answers for the actual market) and the relative distribution of activities on Space & Infrastructure and People & Organisation. The lowest and highest answers are mentioned in brackets and the deviations are remarkable large.

Table 3.15: The size of the Nordic FM market in 2010

Billion Euro	Denmark	Norway	Finland	Sweden	Total
Total/potential market	7,9	9,3	10,0	38,8	66,1
• S&I	4,9	5,6	4,0	(14,0-70,0) 14,0	28,5
• P&O	3,0	3,7	6,0	24,8	37,6
Actual/outsourced market	5,1	2,2	3,9	15,0	26,2
• S&I	2,7	1,4	1,6	(4,0-35,0) 5,4	11,1
• P&O	2,4	0,8	2,3	9,6	15,1
Degree of outsourcing	64%	24%	39%	39%	40%
• S&I	55%	26%	39%	39%	39%
• P&O	79%	22%	39%	39%	40%

4. Comparison, Summary and Conclusions

4.1 Comparison of the results with former studies

Table 4.1 shows a comparison of the results for the former surveys by Capgemini and Teichmann with the results of CFM's new workshop based study presented in section 3.4. It should be noted that the estimations concerns different years.

Table 4.1: Comparison of estimations of the size of the FM market in the Nordic countries

Billion Euro	FM market volume					
	Denmark	Norway	Finland	Sweden	Iceland	Sum
Total						
Capgemini – 2004	8,3	8,9	11,7	23,4	0,7	52,9
Teichmann – 2008	10,8	12,3	8,0	14,9	0,7	46,6
CFM – 2010	7,9	9,3	10,0	38,8		66,0
Actual						
Capgemini -2008	2,8	3,0	4,0	7,9	0,2	18,0
Teichmann – 2008	5,1	4,5	2,9	5,4	0,2	18,1
CFM – 2010	5,1	2,2	3,9	15,0		26,2
Degree of outsourcing						
Capgemini – 2004/2008	34%	34%	34%	34%	34%	34%
Teichmann – 2010	47%	36%	37%	36%	36%	39%
CFM - 2010	64%	24%	39%	39%		40%

The most remarkable differences are the evaluations of the Swedish FM market. The total market is evaluated as low as €14.9 billion by Teichmann and as high as €38.8 billion at CFM's workshop in Sweden and the actual market is evaluated as low as €5.4 billion by Teichmann and as high as €15.0 billion at CFM's workshop in Sweden.

The evaluations of the degree of outsourcing are not very different for the Swedish market. In contrast there are big differences for Denmark and Norway. CFM's result of 64% for the Danish FM Market is much higher than the other evaluations, while CFM's result of 24% for the Norwegian FM market is much lower than the other evaluations.

1.2 Summary and Conclusions

The workshop participants were asked to evaluate the factors that have influenced the amount of total FM activities (in-house and outsourced) for the two periods 2004-2008 and 2008-2010 (before and after the financial crisis started). During the period from 2004-8 the total FM market was influenced by economic growth and development of knowledge and service society with new providers and services, and the period from 2008-10 it was influenced by the financial crisis with increased competition and focus on cost reductions but also with maturing markets in all countries. In both periods the total FM market was influenced by increased globalization, professionalism and focus on sustainability. Political decisions and public procurement regulations were particularly mentioned in Sweden, while labour immigration and lack of local labour force was particularly mentioned in Norway.

The workshop participants were similarly asked to evaluate factors that have influenced the amount of actual FM activities (outsourced) in the long term and in the short term. For both the long and the short term the economical situation and politics are important factors influencing the degree of outsourcing. The most important long term factors are increased globalisation, professionalism and market maturity. The most important short term factors are competition and availability of labour force and competences. For Sweden added value is also mentioned as a short term factor.

The participants evaluated very limited growth rates from 2008-9 and 2009-10 for the total FM market except for Sweden, where the average growth rate were 8 and 10%, but based on few responses. For the actual market the growth rate from 2008-9 was very limited in Norway and Finland and even slightly negative in Denmark, while the growth rate from 2009 to 2010 was around 5% in Denmark and Finland and 1.6% in Norway. For Sweden a growth rate of 7.5% was evaluated for both years, but again based on few responses.

The clients were in the study divided in four main markets. Public service was the largest market for total FM activities in Denmark, Norway and Finland with Private service as second largest. In Sweden Private service was largest and Public service second largest. All countries had Industry ranked as third and Housing associations as fourth for the total market. For the outsourced activities Private service was largest in all four countries. Public service was second largest except for Norway, where Industry was ranked as second and Public service as third.

The distribution on the main activities divided in Space & Infrastructure (S&I) and People & Organisation (P&O) was similar for the total market and the actual market in all countries. However, for Denmark and Norway S&I represented the largest part, while P&O represented the largest part in Finland and Sweden.

Among S&I the highest ranking activity was Space followed by Cleaning in all countries for both the total and the actual market except for Sweden. Here Workplace was ranked highest followed by Primary activity specific, Cleaning Space and Outdoors for the total market, and Workplace was also ranked highest for the actual market followed by Cleaning, Space, Primary activity specific and Outdoors.

Among P&O the highest ranking was ICT in all countries for the total market except for Denmark, where Catering was highest. For the actual market Hospitality/Catering was highest ranking in all four countries.

The overall quantitative result of the study is an estimation of the size of the FM market in all the five Nordic countries as €66.7 billion for the total market and €26.5 billion for the actual market equivalent to a degree of outsourcing of 40% as shown in table 4.2. This is based on the evaluations from the workshops in Denmark, Norway and Sweden as shown in chapter 3, while the figures for Finland and Iceland are estimated from former surveys presented in chapter 2.

Table 4.2: The size of the FM market in the Nordic countries in 2010

Billion Euro	FM market volume in 2010					Sum
	Denmark	Norway	Finland	Sweden	Iceland	
Total	7,9	9,3	10,0	38,8	0,7	66,7
Actual	5,1	2,2	3,9	15,0	0,3	26,5
Degree of outsourcing	64%	24%	39%	39%	39%	40%

It seems that the Danish and Norwegian markets have fairly similar structure except for the degree of outsourcing being much higher in Denmark than Norway. Sweden represent by far the largest market among the Nordic countries, but is also seems to have a different structure from the other Nordic countries. Space is the highest among S&I activities in Denmark, Norway and Finland, which could indicate a strong building related focus, while the strong focus on Workplace among S&I activities and the dominating role of P&O activities in Sweden seem to indicate a strong service related focus and perhaps therefore also that FM organisation has closer relation to their core businesses than FM organisations in the other Nordic countries.

This underlines that the maturity of FM in Sweden is high and particular the clients understanding of the importance of FM in general is at a higher level than in the other Nordic countries. Even though the degree of outsourcing is by far the largest in Denmark, which according to the market model of Teichmann presented in chapter 2 should indicate a high degree of maturity of the FM market, this may merely be a consequence of the long and dominating position of ISS on their home market. It does not necessarily

indicate a high level of understanding among clients of the importance of FM, but can alone be a cost related factor.

References

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DS/EN (2008): *Facility Management – Del 1: Terminologi og definitioner*. (in Danish and English). DS/EN 15221-1. 2. edition. Dansk Standard, 30. June 2008.

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Jensen, Per Anker (2009): *Markedet for Facilities Management i Danmark (The Market for Facilities Management in Denmark)*. Research Report – Danish full version. Centre for Facilities Management – Realdania Research, DTU Management Engineering. June 2009.

Teichmann, Sven A. (2009): *FM Market Size in Europe*. European FM Insight, Issue 11, September 2009, EuroFM.

Annex 1

Documentation from the workshop in

Denmark

The Market for Facilities Management in Denmark

Documentation from workshop at the Technical University of Denmark

27 October 2010

Introduction

Aim of workshop

The workshop was part of EuroFM's 'FM Market Data' project and it was arranged together with a succeeding workshop as part of CFM's project on 'Foresight on Facilities Management'.

The basis for the workshop was CFM's 'FM Market' project from 2008-9 (Jensen, 2009a and b), which used the new definitions for standardized facility products in a proposed European standard for a FM Taxonomy (CEN/TC348, 2009). The aim was to give an updated evaluation of size, structure and trends in both the potential or total market and the actual or outsourced market for FM in Denmark.

The methodology was a workshop based Delphi technique using the participant's qualified guestimates as a basis for discussions and with possibilities to revise the individual evaluations after group discussions. During the workshops the participants filled in a questionnaire, which provided the documentation of the meeting. The following presents the collective results.

Participants and preparation

11 FM professionals participated in the workshop representing FM clients, FM providers and FM researchers in Denmark, see appendix 1. Before the workshop a report about the FM sector and its status in the Nordic countries (Jensen & Dannemand Andersen, 2010) was sent to the participants for possible preparation.

Facilitator

The workshop was facilitated by Professor Per Anker Jensen, Centre for Facilities Management – Realdania Research, DTU Management Engineering.

The total Danish FM market (in-house + outsourced)

Factors that have influenced the amount of total FM activities

The workshop participants provided the evaluations for the two periods 2004-2008 and 2008-2010 shown in appendix 2. The results are summarized below.

The most important factors in the period 2004-2008 before the financial crisis were:

- Economic growth
- Knowledge and service society
- Focus on environment/sustainability/climate
- Integration of functions with synergies
- Professionalism
- New FM areas, e.g. HR, services and growth markets

The most important factors in the period 2008-2010 following the financial crisis were:

- Focus on cost reductions and rationalizations
- More strategic focus on FM
- Knowledge society
- More outsourcing and offshoring
- Professionalism
- Environment, energy

Changes in potential market

The participants evaluated in average the following very limited growth rates:

- 0,2% growth from 2008 to 2009
- 0,3% growth from 2009 to 2010

Ranking of main markets

The participants evaluated in average the following ranking of the four main markets according to size in falling order:

1. Public service
2. Private service

3. Industry etc.
4. Housing organization

Distribution on main activities

The participants evaluated in average the following relative size:

Space & Infrastructure:	62%
People & Organisation:	38%

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size in falling order:

1. Space
2. Cleaning
3. Workplace
4. Outdoors
5. Primary activity specific

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size in falling order:

1. Catering
2. Health, Safety and Security
2. Reception etc.
2. ICT
5. Logistics
6. Business Support
7. Organisation specific

The actual Danish FM market (outsourced)

Factors that have influenced the amount of outsourced FM activities

The workshop participants provided the evaluations for the long term and the short term as shown in appendix 3. The results are summarized below.

The most important factors in the long term were:

- Strategic corporate considerations
- Politics
- Focus on core business
- Provider efficiency
- Professionalisation
- More providers
- Technology

The most important factors in the short term were:

- Economy
- Competition
- Politics
- Competences (or lack of)

Changes in actual market

The participants evaluated in average a slight negative growth rate followed by a strong positive growth rate:

- -0,7% growth from 2008 to 2009
- 4,9% growth from 2009 to 2010

Ranking of main markets

The participants evaluated in average the following ranking of the four main markets according to size in falling order:

1. Private service
2. Public service
3. Industry etc.
4. Housing organization

As a contrast to the total market, private service is the largest before public service for the actual market.

Distribution on main activities

The participants evaluated in average the following relative size:

Space & Infrastructure:	53%
People & Organisation:	47%

Like for the total market, Space & Infrastructure represents the largest activities, but with a much smaller margin.

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size in falling order:

1. Space
2. Cleaning
3. Workplace
4. Outdoors
5. Primary activity specific

The ranking is similar to the total market.

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size in falling order:

1. Catering
2. Reception etc.

3. Health, Safety and Security
4. ICT
5. Logistics
6. Business Support
7. Organisation specific

This ranking is slightly different as rank 2, 3 and 4 for the actual market were all ranked as 2 for the total market.

The size of the Danish FM market

Former evaluations have resulted in the following estimations of the potential and actual FM market in Denmark.

Billion DKK	CapGemini Norway 2004	CapGemini Norway 2008 (extrapolated)	Teichmann Germany 2008	CFM Denmark 2008
Potential	62	(62)	82	59
Actual	16	22 (8% per year)	38	37
Outsourcing	25% (all Nordic countries)	25% (all Nordic countries)	47%	62%

As a main result of the workshop, the size of the Danish FM market has been estimated as shown below, based on the average growth rates from 2008 to 2009 for the potential and actual market and the relative distribution of activities on Space & Infrastructure and People & Organisation.

Billion DKK	Total/potential market	Actual/outsourced market	Degree outsourcing of
Space & Infrastructure	36,8	19,3	53%
People & Organisation	22,6	17,1	76%
Total	59,4	36,4	61%

References

CEN/TC348 (2009): *Taxonomy of Facility Management – Classification and Structures*. prEN 15221-4, October 2009.

Jensen, P.A. (2009a): *Markedet for Facilities Management i Danmark*, Centre for Facilities Management – Realdania Forskning, DTU Management Engineering, Technical University of Denmark, June 2009.

Jensen, P.A. (2009b): *The Market for Facilities Management in Denmark*, Centre for Facilities Management – Realdania Forskning, DTU Management Engineering, Technical University of Denmark, Report presented at EuroFM seminar at ISS in Copenhagen 11 September 2009.

Jensen, P.A. and Dannemand Andersen, P. (2010): *The FM Sector and its Status in the Nordic Countries*, Centre for Facilities Management – Realdania Forskning, DTU Management Engineering, Report 21.2010, Technical University of Denmark, October 2010.

Appendix 1. Participants

Potential participants were invited from the board of Danish Facilities Management Association (DFM), DFM's education committee and the former reference group for CFM project on the Danish FM market as well as a few other key persons selected by Per Anker Jensen, head of CFM.

The actual participants were:

Flemming Wulff Hansen, Datea
 Inger Ravn, SpacePro
 Kjeld Nielsen, FAM-consult
 Jan Stiiskjær, DI Service
 Thomas Hauge Berg, DI Service
 Søren Wolsing, Coloplast
 Nicholas Desnoyers, HSG Zander
 Bjarne L. Poulsen, Københavns Erhvervsakademi
 Mads Bo Bojesen, Gribskov Kommune
 Camilla Kølsen, Alexandra Instituttet
 Susanne Balslev Nielsen, CFM

The facilitators of the succeeding workshop, Head of Section Per Dannemand Andersen and Senior Researcher Birgitte Rasmussen from the 'Innovation Systems and Foresight' section at DTU Management Engineering, participated as observers.

Appendix 2. Factors that have influenced the amount of total FM activities (in-house + outsourced)

2004-2008	2008-2010
Specialisering/opdeling i vidensamfund og service → Leverandører er blevet professionelle og har reel FM erfaring	Fortsætter
Fokus på miljø/bæredygtighed Samling af funktioner for at skabe synergier	Finanskrisen → Fokus på kerneaktiviteter/ besparelser/effektiviseringer
Stor aktivitet i byggeriet / ejendomsmarkedet	Ønske om professionalisering og ikke mindst jagten på besparelser Der skal skabes værdi! Skarp på omkostninger
Fokus – output Udvikling Fokus på kerneforretning → muligheder for nye typer service Bæredygtighed / miljø → Klima → Økonomi	Fokus – input ← Finanskrisen Besparelser
Focus on core competences Professionalism Process	Cost savings (energy - penge) One point of contact Miljø
Økonomisk vækst / krise Omsætning i virksomhed / myndighed	
	Større strategisk forståelse hvor I-FM bliver vurderet nærmere. Det betyder også, at outsourcing/ in-sourcing vurderes i et strategisk perspektiv. Årsagen kan tilskrives større forståelse for FM i virksomhedsledelserne samt ønsket om at opnå omkostningsreduktioner og revurdering af serviceniveauer.
	Bliver mere strategiske fordi økonomien spiller en stor rolle. Ledelserne vil gerne optimere omkostningerne.
Bedste køb = omkostning/værdi Udviklings FM – nye områder fx FM + HR (helhed) IKT systemer indføres Konsolidering af FM Videns samfund / service samfund Processerne	Omkostninger Besparelser/nedskæringer Back-to-basic – kernevirksomheden Udflagning Skump Mere outsourcing
Større aktivitet i CB ? Efterspørgsel af? Nye FM markeder i vækst (processer) Samling af FM discipliner	Optimering Nøgletal De tekniske discipliner i fokus
Bygninger drevet før, men nu ny ledelsesdisciplin at spejle sig i Forvent på styr på bygningsdrift, mål/veje Krise, prioritere, skære ned	Videnssamfund Rammer for vidensarbejde i fokus Styr på økonomi

Appendix 3. Factors that have influenced the amount of actual FM activities (outsourced)

På lang sigt	På kort sigt
Virksomhedsstrategiske beslutninger Leverandørers effektivitet	Dårlig intern FM ledelse
Virksomhedens strategiske fokus Større leverandørmarked	Økonomiske hensyn
Professionalisering Kvalitet Strategiske overvejelser Fokus på kerneforretning Adgang til viden og værktøjer	Økonomi Lave / kendte omkostninger
Politik / holdning Marked → udbydere Strategi / udvikling Fokus på kerneydelser Kompetencer / viden	Økonomi Rammebetingelser / krav "Opgiver"
Geographical coverage / location	Competition Kost / økonomi Competences
Virksomheder tænke strategisk Flere udbydere Leverandører bliver mere effektive	Virksomhed opgives Intern løsning
Øget fokus på kerneforretning, hvilket kan legitimere outsourcing trods øgede omkostninger ved outsourcing	
Kernekompetencefokus Professionalisering It løsninger som cloud computing (5 år)	Ved innovation, nye forretningsområder > kompetencebistand Politisk rammestyring
Professionaliseret marked (service providers)	Økonomisk gevinst Ruske op i organisationen Kompetencer Konkurrenceudsætte
Organisation: Opbygning af FM- org. Teknologier Demografisk fokus Professionalisering Strategier	Do.
Lønomsstninger Organisationsvisioner / strategi Politiske direktiver	Kompetence / kapacitets mangler

Annex 2

Documentation from the workshop in

Norway

The Market for Facilities Management in Norway

Documentation from workshop at NHO Service in Oslo

5 November 2010

Introduction

Aim of workshop

The workshop was part of EuroFM's 'FM Market Data' project and it was arranged together with a succeeding workshop as part of CFM's project on 'Foresight on Facilities Management (FM).

The basis for the workshop was the new definitions for standardized facility products in a proposed European standard for FM Taxonomy (CEN/TC348, 2009) and also data on parts of the Norwegian FM market provided by NHO-Service. The aim was to give an updated evaluation of size, structure and trends in both the potential or total market and the actual or outsourced market for FM in Norway.

The methodology was a workshop based Delphi technique using the participant's qualified guestimates as a basis for discussions and with possibilities to revise the individual evaluations after group discussions. During the workshops the participants filled in a questionnaire, which provided the documentation of the meeting. The following presents the collective results.

Participants and preparation

9 FM professionals participated in the workshop representing FM clients, FM providers and FM researchers in Norway, see appendix 1. Before the workshop a report about the FM sector and its status in the Nordic countries (Jensen & Dannemand Andersen, 2010) was sent to the participants for possible preparation.

Facilitator

The workshop was facilitated by Professor Per Anker Jensen, Centre for Facilities Management – Realdania Research, DTU Management Engineering.

The total Norwegian FM market (in-house + outsourced)

Factors that have influenced the amount of total FM activities

The workshop participants provided the evaluations for the two periods 2004-2008 and 2008-2010 shown in appendix 2. The results are summarized below.

The most important factors in the period 2004-2008 before the financial crisis were:

- Economic growth
- Restructuring of core business – more non-core
- Internationalisation - labour immigration
- Development of service sector
- Higher quality requirements
- Professionalism
- Business continuity (after 9/11)

The most important factors in the period 2008-2010 following the financial crisis were:

- Focus on cost reductions
- Lack of local labour force
- Cuts in public sector
- More providers
- Maturing market
- Environment, sustainability

Changes in potential market

The participants evaluated in average the following limited growth rates:

- 0,6% growth from 2008 to 2009
- 1,8% growth from 2009 to 2010

Ranking of main markets

The participants evaluated in average the following ranking of the four main markets according to size in falling order:

1. Public service
2. Private service
3. Industry etc.
4. Housing organization

Distribution on main activities

The participants evaluated in average the following relative size:

Space & Infrastructure:	60%
People & Organisation:	40%

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size in falling order:

1. Space
2. Cleaning
3. Workplace
4. Outdoors
5. Primary activity specific

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size in falling order:

1. ICT
2. Catering
3. Reception etc.
4. Logistics
5. Health, Safety and Security
6. Business Support
7. Organisation specific

The actual Norwegian FM market (outsourced)

Factors that have influenced the amount of outsourced FM activities

The workshop participants provided the evaluations for the long term and the short term as shown in appendix 3. The results are summarized below.

The most important factors in the long term were:

- National economic situation
- Politics
- Labour force
- Size of companies
- Professionalisation
- Competition

The most important factors in the short term were:

- Cost focus
- Politics – municipal election 2011
- Availability of labour force
- Competences (or lack of)
- Professionalism on both sides

Changes in actual market

The participants evaluated in average limited growth rates slightly lower than for the total market:

- 0,4% growth from 2008 to 2009
- 1,6% growth from 2009 to 2010

Ranking of main markets

The participants evaluated in average the following ranking of the four main markets according to size in falling order:

1. Private service
2. Industry etc.
3. Public service
4. Housing organization

As a contrast to the total market, private service is the largest before industry etc. and public service for the actual market.

Distribution on main activities

The participants evaluated in average the following relative size:

Space & Infrastructure:	64%
People & Organisation:	36%

Like for the total market, Space & Infrastructure represents the largest activities and with an even larger margin.

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size in falling order:

1. Space
2. Cleaning
3. Outdoors
4. Workplace
5. Primary activity specific

The ranking is slightly different from the total market by having Outdoors before Workplace.

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size in falling order:

1. Catering
2. Reception etc.
3. ICT
4. Health, Safety and Security
5. Logistics
6. Business Support
7. Organisation specific

This ranking is different from the total market with ICT moving from rank 1 to 3 and Health, Safety and Security changing rank with Logistics.

The size of the Norway FM market

Former evaluations have resulted in the following estimations of the potential and actual FM market in Norway. The data from NHO-Service only covers part of the products on the FM market, see appendix 4.

Billion DKK	CapGemini Norway 2004	CapGemini Norway 2008 (extrapolated)	Teichmann Germany 2008	NHO-Service Norway 2009
Potential	€ 8,9	(€ 8,9)	€ 12,3	€ 3,534
Actual	€ 2,2	€ 3,0 (8% per year)	€ 4,5	€ 0,2463
Outsourcing	25% (all Nordic countries)	34%	36%	7%

As a main result of the workshop, the size of the Norwegian FM market has been estimated as shown below. It should be noted that it is only based on estimates from 5 participants and the lowest and highest estimation are shown in brackets to indicate the uncertainty. The figures for Space & Infrastructure and People & Organisation have been calculated from the relative distribution stated earlier.

Billion Euro	Total/potential market	Actual/outsourcesd market	Degree of outsourcing
Space & Infrastructure	5,5	1,4	26%
People & Organisation	3,7	0,8	22%
Total, average of 5 (lowest – highest)	9,2 (8,0 - 10,0)	2,2 (0,8 – 3,5)	24%

References

CEN/TC348 (2009): *Taxonomy of Facility Management – Classification and Structures*. prEN 15221-4, October 2009.

Jensen, P.A. and Dannemand Andersen, P. (2010): *The FM Sector and its Status in the Nordic Countries*, Centre for Facilities Management – Realdania Forskning, DTU Management Engineering, Report 21.2010, Technical University of Denmark, October 2010.

Appendix 1. Participants

Potential participants were invited by Lasse K. Tenden, NHO-Service and Olav Egil Sæbøe, secretary for NordicFM.

The actual participants were:

Berit Tyldum, Høgskolen i Akershus
Lise Klevan, Coor Service Management
Trine Berntsen, Compass Group
Inge Hilde Kitterod, Addici
Margrethe Foss, Multiconsult
Olav Egil Sæbøe, Pro-FM
Trond Smogeli, ISS
Eystein C. Husebye, NBEF
Lasse K. Tenden, NHO-Service

The facilitators of the succeeding workshop, Head of Section Per Dannemand Andersen and Senior Researcher Birgitte Rasmussen from the ‘Innovation Systems and Foresight’ section at DTU Management Engineering, participated as observers.

Appendix 2. Factors that have influenced the amount of total FM activities (in-house + outsourced)

2004-2008	2008-2010
Opretholde virksomhedsniveau Restrukturering af kernevirkksomhed har flyttet grænsesnippet, så at mere defineres som støtte ("non core")	Bærekraftige løsninger Miljøbevarende tiltag Merværdi til kerneorganisation Kvalitet / produktivitet Konsekvenser af finanskrisen: Større opmærksomhed på fleksibilitet i service ydelser / omkostningsreduktion
Internationalisering Øget fokus på kernevirkksomhed Behov for omkostningsreduktion Øget fokus på specialisering Øget fokus på effektivisering Frigøre ressourcer	Finanskrisen Vækst i offentlig sektors bevillinger påvirker negativt Reduceret outsourcing i off. sektor Fokus på SLA / kvalitet Fokus på omkostningsreduktion Mangel på arbejdskraft
	Indvandringen (?) Finanskrisen Kundskabsniveauet i Norge Størrelsen på bedrifter Sammenlægning/opkøb Ændring i folks holdning til manuelt arbejde Mangel på norsk arbejdskraft Højere krav til sikkerhed/miljø
Værdi.....udvikling (?) Lav modenhed / lav bevidsthed omkring FM tjenester Ikke placeret strategisk i org. Gerne håndteret af office manager e.lign.	Værdi.....udvikling (?) Modenhed + kendskab til muligheder gennem øget information om FM Økonomisk bevidsthed i.f.t. leverandørkvalitet / højere krav stilles (bl.a. pga. brancheinitiativ) Reduktion i FM tjenester som følge af finanskrisen / revurdering af behov
Stærk økonomi, behovet var reduceret på at fokusere på disse områder Nyere/spirende udvikling af servicesektor Meget fokus på single service	Flere bedrifter bliver optaget af 'egen økonomi' og fokus på 'core business' Bevidst holdning til køb af tjenester af professionelle drivere, flere tjenester fra 1 (?). Flere aktører på markedet Større mediefokus på tjenester
	Finanskrisen – "stop" eller nedgang i beskæftigelsen og reduktion i kvm. byggeri. Mere erfaring med FM begrebet fra naboland i Norden - Norge følger efter. Offentlig sektor: Øget aktivitet/indsats under finanskrisen. Øget behov for sikkerhedstjenester (efter 9/11). Effektivisering af byggeriet (mere åbne løsninger).
Fokus på kernevirkksomhed Øget behov for R&D → behov for at frigøre kapital og være hurtig til omstilling Internationalisering Modning af markedet Indvandring af arbejdskraft	Krav om cost-cut Mere bevidsthed om FM rollen Hårdere kommunal økonomi Modning af norsk marked, ikke udviklet → opkommende i.h.t. (Teichmann) Offentlige besparelser
Øget professionalisering inden for FM drift og indkøb 9/11 → mere fokus på business continuity Mobilitet i arbejdshverdagen → lavere kontorareal	Finanskrisen: Nedgang i volumen af FM tjenester

"More for less"	
Højere kvalitetskrav Generelt bedre økonomi Demografi, tilgang af relativ billig arbejdskraft Øgede sikkerhedskrav Krisehåndtering (efter 9/11)	Større modenhed, mere fokus på kernevirkksomhed Frigjort kapital BPR Omkostningsreduktion

Appendix 3. Factors that have influenced the amount of actual FM activities (outsourced)

På lang sigt	På kort sigt
Politisk indstilling Størrelsen på bestiller- organisationerne	Mere kompetent leverandørmarked Mere kompetent bestiller-niveau
Fokus på kernevirkksomhed Arbejdskraft Specialisering for at effektivisere Konkurrenceevne og behov for omkostningsreduktion Politik	Standardisering i internationale bedrifter Omkostningsreduktion Ændringer i arbejdskraft Ønsker variable omkostninger
Politik Befolkningsstruktur Størrelsen på bedrifter Teknisk udvikling Kompetenceniveauet	Tilgang af arbejdskraft
I offentlig sektor: Moms- problematikken (politisk holdning) Økonomisk situation i Norge Behov for arbejdskraft	Økonomisk klima / udvikling (dobbelt dip??)
Økonomi Resourcer (kompetence) / arbejdskraft Politisk betinget	Økonomi Ledelse = focus/strategi i bedriften Ejerstruktur (ejendom, bedrift, offentlig)
Outsourcing i offentlig sektor (kommunale virksomheder) Kendskab til FM begrebet indkøbskompetence. FM leverandører som partnere i stedet for leverandører	Fokus på omkostninger som følge af finanskrisen Hårdere konkurrence → behov for at fokusere på kernevirkksomhed Effektivitet / pris på tjenester, dvs. omkostningseffekten for virksomhederne. Outsourcing et negativt ladet begreb Manglende bestillerkompetence
Pris – pris – pris Erfaringer fra allerede outsourcete markeder FM leverandørens evne til at være partnere/proaktive	Pris – pris – pris Politik → ideologi Økonomiske rammebetingelser Konjunkturer
Borgerlig vs. Socialistisk regering Økonomisk situation i Norge (off. sektor) Behov for arbejdskraft Professionalitet i leverandør- markedet - skræddersyet til enkeltbrancher	Professionalitet i leverandør- markedet - skræddersyet til enkeltbrancher
Politik Økonomi Forskriftændringer Centralisering	Politik → Kommunevalget 2011

Appendix 4. Data from NHO-Service

	Total turnover	
	Potential market	Outsourced market
	€billion	€billion
Space & Infrastructure (S&I)		
Space (Accommodation)	1,861	0,13
Outdoors	0,09	0,0063
Cleaning	0,29	0,02
Workplace	0	0
Primary activity specific	0	0
Sum for all S&I	2,241	0,1563
People & Organisation (P&O)		
Health, safety, security and environment	0,81	0,06
Hospitality	0,483	0,03
ICT (Management & Advisement)	0	0
Logistics	0	0
Business Support (management support)	0,7	0,05
Organisation specific (industry sector)	0	0
Sum for all P&O	1,293	0,09
Strategic, tactical and central funtions		
Sum	?	?
FM total	3,534	0,2463

Annex 3

Documentation from the workshop in

Finland

The Market for Facilities Management in Finland

Documentation from workshop at Rakli, Helsinki

10 November 2010

Introduction

Aim of workshop

The workshop was part of EuroFM's 'FM Market Data' project. As a preparation of this project and CFM's parallel project on FM Futures a report about the FM sector and its status in the Nordic countries had been produced (Jensen & Dannemand Andersen, 2010).

The basis for the workshop on the FM market was the new definitions for standardized facility products in a proposed European standard for FM Taxonomy (CEN/TC348, 2009). The aim was to give an updated evaluation of size, structure and trends in both the potential or total market and the actual or outsourced market for FM in Finland.

The methodology was a workshop based Delphi technique using the participant's qualified guestimates as a basis for discussions and with possibilities to revise the individual evaluations after group discussions. During the workshops the participants filled in a questionnaire, which provided the documentation of the meeting. The following presents the collective results.

Participants and organisation

7 professionals participated in the workshop representing FM providers, research and Rakli etc., see appendix 1. The workshop was organized in collaboration between CFM, Aalto University and Rakli, which is a Finnish building clients association. The participants were invited by Rakli and Aalto University. Rakli hosted the meeting at their office in Helsinki.

During the workshop the participants were asked to fill in a questionnaire. A total of 5 questionnaires were received. The results in this document are based on the questionnaire survey.

Facilitator

The workshop was facilitated by Professor Per Anker Jensen, Centre for Facilities Management – Realdania Research, DTU Management Engineering.

The total Finnish FM market (in-house + outsourced)

Factors that have influenced the amount of total FM activities

The workshop participants provided the evaluations for the two periods 2004-2008 and 2008-2010 shown in appendix 2. The results are summarized below.

The most important factors in the period 2004-2008 before the financial crisis were:

- Outsourcing
- Euro and internalization
- New providers and new services
- Public savings
- Business restructuring

The most important factors in the period 2008-2010 following the financial crisis were:

- Financial turmoil and increased competition
- Cost control
- Globalisation
- Environment and green buildings
- Business change and risk management

Changes in potential market

No participants responded to questions about growth rates from 2008 to 2009 and from 2009 to 2010.

Ranking of main markets

The participants evaluated in average the following ranking of the four main markets according to size in falling order:

1. Public service
2. Private service
3. Industry etc.
4. Housing organization

Distribution on main activities

The participants evaluated in average the following relative size:

Space & Infrastructure:	40%
People & Organisation:	60%

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size in falling order:

1. Space
2. Cleaning
3. Workplace
4. Outdoors
5. Primary activity specific

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size in falling order:

1. ICT
2. Health, Safety and Security
3. Logistics
4. Business Support
5. Hospitality
5. Organisation specific

As can be seen Hospitality and Organisation specific were evaluated similarly as the lowest.

The actual Finnish FM market (outsourced)

Factors that have influenced the amount of outsourced FM activities

The workshop participants provided the evaluations for the long term and the short term as shown in appendix 3. The results are summarized below.

The most important factors in the long term were:

- Global connectivity and global markets
- Market changes and more developed services
- Professionalism and well educated personnel
- Outsourcing risks

The most important factors in the short term were:

- Cost effectiveness
- Organisational changes

Changes in actual market

Only 1 participant responded and the evaluated the following quite high growth rates:

- 0,0% growth from 2008 to 2009
- 5,0% growth from 2009 to 2010

Ranking of main markets

The participants evaluated in average the following ranking of the four main markets according to size in falling order:

1. Private service
2. Public service
3. Industry etc.
4. Housing organization

Private service is highest which is different from the total market, where Public service was evaluated highest.

Distribution on main activities

This and the following questions were only answered by one participant.

The participant evaluated in average the following relative size:

Space & Infrastructure: 40%
People & Organisation: 60%

This is also similar to the evaluation of the total market.

Ranking of activities for Space & Infrastructure

The participant evaluated in average the following ranking according to size in falling order:

1. Space
2. Cleaning
3. Outdoors
4. Workplace
5. Primary activity specific

The ranking is slightly different from the total market, where Workplace was third and here it is ranked as number four.

Ranking of activities for People & Organisation

The participant evaluated in average the following ranking according to size in falling order:

1. Hospitality
2. ICT
3. Logistics
4. Health, Safety and Security
5. Organisation specific
6. Business Support

This ranking is quite different from the total market where ICT was highest, Health, Safety and Security next highest and Organisation specific lowest.

The size of the Finnish FM market

Former evaluations have resulted in the following estimations of the potential and actual FM market in Finland.

Billion Euro	CapGemini Norway 2004	CapGemini Norway 2008 (calculated)	Teichmann Germany 2008
Potential	€ 12	(€ 12)	€ 8,02
Actual	€ 3	€ 4,4 (8% pr. year)	€ 2,93
Outsourcing	25% (Nordic)	48%	36,5%

No participants filled in any evaluation of the size of the Finnish FM market, but an evaluation of the actual market as higher than € 3 in 2009 and a degree of outsourcing around 30% was mentioned.

An average of the above mentioned figures from 2008 gives an indicative size of the total Finnish FM market in 2009 of €10,0 billion and for the actual market €3,9 billion, which means a degree of outsourcing of 39%.

References

CEN/TC348 (2009): *Taxonomy of Facility Management – Classification and Structures*. prEN 15221-4, October 2009.

Jensen, P.A. and Dannemand Andersen, P. (2010): *The FM Sector and its Status in the Nordic Countries*, Centre for Facilities Management – Realdania Forskning, DTU Management Engineering, Report 21.2010, Technical University of Denmark, October 2010.

Appendix 1. Participants

Potential participants were invited by Rakli and Aalto University aiming at a broad presentation of FM professionals in Finland.

The actual participants were:

Päivi Raitanen, Lassila Tikanoja
Jessica Niemi, KTI
Sami Kärna, Aalto University
Helena Sillanpää, Aalto University
Reijo Rauhala, Fortum
Erkki Aalto, Rakli
Juha Tiuraniemi, Rakli

Appendix 2. Factors that have influenced the amount of total FM activities (in-house + outsourced)

2004-2008	2008-2010
<ul style="list-style-type: none"> • Outsourcing – national level • Municipal business – only few • ---- profit period – steady growth • Green values 	<ul style="list-style-type: none"> • Outsourcing – national level, Baltic rim, global • Municipal business – more -> slow motion trend • Financial turmoil – organizational changes, cost efficient and flexible space, business FM services • Energy savings – green buildings
<ul style="list-style-type: none"> • To focus on the core business and outsource the support services • Professional personnel to do the FM services <ul style="list-style-type: none"> ➔ Outsource to the companies that have interest in developing services ➔ Service provider companies have R&D departments -> more developed services 	<ul style="list-style-type: none"> • Not good economic situation, companies have to do cost savings -> buy cheapest product, do not have money to develop FM services
<ul style="list-style-type: none"> • New products and new players • Internationalisation • Euro 	<ul style="list-style-type: none"> • New technology - building technology • Core business focus • New ways of working – mobile, information based <ul style="list-style-type: none"> ➔ Focus on lifecycle rather than just operational ➔ New service offerings -> market push
<ul style="list-style-type: none"> • New service providers entering the market – “total solutions” • Public sector -> cost savings responsibility to the service providers • Municipalities – expected that they would outsource 	<ul style="list-style-type: none"> • Financial crisis -> cost control – efficiency • Competition in the market • Effective ways of doing outsourcing • Business changes • Harmonisation of global – 5 years • Nordic level -> Global -> global agreements • Business risk management
<ul style="list-style-type: none"> • Find out new effective ways to do FM • Find out cost levels and restructure company (mergers and acquisitions) • Business change situation (harmonize corporate activities) 	<p>2008-2010:</p> <ul style="list-style-type: none"> • Environmental responsibility • Cost control <p>2010-2015:</p> <ul style="list-style-type: none"> • Retirements • Municipalities – how they, new attractive work (?)

Appendix 3. Factors that have influenced the amount of actual FM activities (outsourced)

In the long term	In the short term
<ul style="list-style-type: none"> • Global connectivity • Global markets • Market changes • Core business expertise/complicated real estate business itself (industry) • Well educated persons 	<ul style="list-style-type: none"> • Cost effectiveness • Organisational changes
<ul style="list-style-type: none"> • Cost saving • Better services • More developed services • Professional personnel • Outsource the risks 	(the same as in the long term)
-	-
-	<ul style="list-style-type: none"> • Cost effectiveness
<ul style="list-style-type: none"> • Globalisation • Focus on core business • Professionalism 	<ul style="list-style-type: none"> • Cost effectiveness

Annex 4

Documentation from the workshop in

Sweden

The Market for Facilities Management in Sweden

Documentation from workshop at DN Skrapan, Stockholm

15 March 2011

Introduction

Aim of workshop

The workshop was part of EuroFM's 'FM Market Data' project and it was arranged together with a succeeding workshop as part of CFM's project on 'Foresight on Facilities Management'. As a preparation of both projects a report about the FM sector and its status in the Nordic countries had been produced (Jensen & Dannemand Andersen, 2010).

The basis for the workshop on the FM market was the new definitions for standardized facility products in a proposed European standard for FM Taxonomy (CEN/TC348, 2009). The aim was to give an updated evaluation of size, structure and trends in both the potential or total market and the actual or outsourced market for FM in Sweden.

The methodology was a workshop based Delphi technique using the participant's qualified guestimates as a basis for discussions and with possibilities to revise the individual evaluations after group discussions. During the workshops the participants filled in a questionnaire, which provided the documentation of the meeting. The following presents the collective results.

Participants and organisation

13 FM professionals participated in the workshop representing FM clients, FM providers and IFMA Sweden etc., see appendix 1. The workshop was organized in collaboration between CFM and IFMA Sweden. The participants were invited by IFMA Sweden, who also hosted the meeting at the conference centre Tornet on the top floor of the high rise building DN Skrapat.

During the workshop the participants were asked to fill in a questionnaire. A total of 10 questionnaires were received. The results in this document are based on the questionnaire survey.

The workshop was facilitated by Professor Per Anker Jensen, Centre for Facilities Management – Realdania Research, DTU Management Engineering.

The total Swedish FM market (in-house + outsourced)

Factors that have influenced the amount of total FM activities

The workshop participants provided the evaluations for the two periods 2004-2008 and 2008-2010 shown in appendix 2. The results are summarized below.

The most important factors in the period 2004-2008 before the financial crisis were:

- Save money by outsourcing
- Political intentions and decisions
- Public procurement regulations
- Economic growth

The most important factors in the period 2008-2010 following the financial crisis were:

- Maturing market
- Higher competences
- Cost focus
- Politics

Changes in potential market

Only 3 participants responded and they evaluated in average the following quite high growth rates:

- 8,0% growth from 2008 to 2009
- 10,0% growth from 2009 to 2010

Ranking of main markets

The participants evaluated in average the following ranking of the four main markets according to size in falling order:

1. Private service
2. Public service
3. Industry etc.
4. Housing organization

Distribution on main activities

The participants evaluated in average the following relative size:

Space & Infrastructure:	36%
People & Organisation:	64%

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size in falling order:

1. Workplace
2. Primary activity specific
3. Cleaning
4. Space
5. Outdoors

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size in falling order:

1. ICT
2. Hospitality
3. Health, Safety and Security
4. Logistics
5. Business Support
6. Organisation specific

The actual Swedish FM market (outsourced)

Factors that have influenced the amount of outsourced FM activities

The workshop participants provided the evaluations for the long term and the short term as shown in appendix 3. The results are summarized below.

The most important factors in the long term were:

- Political intentions and regulations
- Maturing clients
- Globalisation
- Increasing market
- FM more known

The most important factors in the short term were:

- Economical situation
- Added value

Changes in actual market

Only 2 participants responded and they evaluated in average the following quite high growth rates:

- 7,5% growth from 2008 to 2009
- 7,5% growth from 2009 to 2010

Ranking of main markets

The participants evaluated in average the following ranking of the four main markets according to size in falling order:

1. Private service
2. Public service
3. Industry etc.
4. Housing organization

This is similar to the evaluation of the total market.

Distribution on main activities

The participants evaluated in average the following relative size:

Space & Infrastructure: 36%
 People & Organisation: 64%

This is also similar to the evaluation of the total market.

Ranking of activities for Space & Infrastructure

The participants evaluated in average the following ranking according to size in falling order:

1. Workplace
2. Cleaning
3. Space
4. Primary activity specific
5. Outdoors

The ranking is slightly different from the total market, where Primary activity specific was second and here it is ranked as number four.

Ranking of activities for People & Organisation

The participants evaluated in average the following ranking according to size in falling order:

1. Hospitality
1. ICT
3. Health, Safety and Security
4. Logistics
5. Business Support
6. Organisation specific

This ranking is slightly different from the total market with Hospitality and ICT with same ranking at the top.

The size of the Swedish FM market

Former evaluations have resulted in the following estimations of the potential and actual FM market in Sweden.

Billion Euro	CapGemini Norway 2004	CapGemini Norway 2008 (calculated)	Teichmann Germany 2008	CapGemini Norway 2010 (calculated)
Potential (total)	€ 23,00	(€ 23,00)	€ 14,86	(€ 23,00)
Actual	€ 5,75	€ 7,82 (8% pr. year)	€ 5,42	€ 9,12 (8% pr. year)
Outsourcing	25% (Nordic)	34%	36,5%	40%

As a main result of the workshop, the size of the Swedish FM market in FM market has been estimated as shown below based on the evaluation by the participants (7 answers for total market and 5 answers for the actual market) and the relative distribution of activities on Space & Infrastructure and People & Organisation. The lowest and highest answers are mentioned in brackets and the deviations are remarkable large.

Billion Euro	Total/potential Market	Actual/outsources market	Degree of outsourcing
Space & Infrastructure	14,0	5,4	39%
People & Organisation	24,8	9,6	39%
Total	38,8 (14,0 – 70,0)	15,0 (4,0 – 35,0)	39% (27 – 50%)

References

CEN/TC348 (2009): *Taxonomy of Facility Management – Classification and Structures*. prEN 15221-4, October 2009.

Jensen, P.A. and Dannemand Andersen, P. (2010): *The FM Sector and its Status in the Nordic Countries*, Centre for Facilities Management – Realdania Forskning, DTU Management Engineering, Report 21.2010, Technical University of Denmark, October 2010.

Appendix 1. Participants

Potential participants were invited by IFMA Sweden aiming at a broad presentation of FM professionals in Sweden.

The actual participants were:

Ola Hernström, Compass
 Mikael Esplinger, Deloitte
 Lasse Jensen, Svenska Spel
 Björn Mosell, Microsoft, GEMS
 Lasse Johanson, Svea Hovrätt
 Pia Andersson, Sodexo
 Thorleif Nilsson, Regeringskansliet
 Anette Olofsson, Regeringskansliet
 Håkon Arnstad, CapGemini
 Heléne Jansdottir Lindholm, Mentor Online
 Jenny Lundstrøm, Compass
 Erik Ahrsjö, IFMA
 Arne Höggren, IFMA

The facilitators of the succeeding workshop, Head of Section Per Dannemand Andersen and Senior Researcher Birgitte Rasmussen from the 'Innovation Systems and Foresight' section at DTU Management Engineering, participated as observers.

Appendix 2. Factors that have influenced the amount of total FM activities (in-house + outsourced)

2004-2008	2008-2010
-	-
Politisk beslut LOU (Public procurement regulation) Tillväkst Spara pengar	Mognat marknad Hållbarhet Fokus qualité
Spara pengar Uppstyrt	Politik LOU – økad kompetens Lev. högre kunskap Kostnadsdriv Flexible personallösningar
Spara pengar, outsourcing för at spara	Politik LOU Utbildning
Konjunkturcyklor Politiske intentioner LOU	-
-	-
-	-
Add value Fler tjänster – upp til os at utveckla fler tjänster Byte av personal	
-	-
-	Lågkonjunktur Personalbrist Bättre le..... Politisk svängning Sk... vin....

Appendix 3. Factors that have influenced the amount of actual FM activities (outsourced)

In the long term	In the short term
Kostnad Kundskap Förändring/flexibilitet Best practice	-
Lagar & regler Entr. mognad Marknaden bliver större Sv. -> Norden -> EU -> EMAS	Konjunkturen
Nordisk/global upphandling/samordning Besparingar Krav – uppföljning Mognad hos köpare – kund Politiske intentioner	-
Politik	Händelser
Finans..... Politiske intentioner	Omvärldensfaktorer
-	-
-	-
Omvärlden Politiske intentioner FM – mer välkänt Fler internationale förfrågningar Lagstiftningen (facket)	-
Politiske int. Mognad i marknaden	-
Strategisk funktion Levarandörers utbud Politiske intentioner Fortroende for branchen Lagstiftning	Offentlig sektor Added value

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